

Michigan Court of Appeals eFiling Release 1.0 Filer User Guide

September 9, 2005

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Introduction to eFiling

The Michigan Courts eFiling System provides a consistent and convenient way to electronically submit court filings to participating State courts at no additional cost to the filer.

- For the Court of Appeals, the scope of this pilot project includes a Generic Cover Sheet that is used to make electronic filings with the Court of Appeals. This form enables a user to file up to ten documents (attachments) and make the necessary fee payment in a single transaction. A standard Proof of Service is part of the form, and attachments to the form can include claims of appeal, docketing statements, briefs, motions, stipulations, or other miscellaneous items. As users complete the Generic Cover Sheet and attach files, the correct filing fees will be automatically calculated for use in finalizing the transaction.
- Although the basic eFiling System is ultimately intended for use in all Michigan courts, it has only been deployed in one district court so it will be new to virtually all users.
- Full documentation of the eFiling System will be available online.
- During the test period, and until formal notice from the Court of Appeals, the Court will continue to require paper filings of all original documents submitted through the eFiling System.
- Court of Appeals eFilings will not be accepted until Monday, June 20, 2005.



eFiling Quick Start for Filers

This section provides a brief summary of the steps you need to use the eFiling System.

- Access the eFiling System. To do so, enter the following eFiling URLs into your browser's Address bar: https://secure.courts.michigan.gov/courts/wps/portal or https://secure.courts/wps/portal or https://secure.courts/wps/portal or https://secure.courts/wps/portal or https://secure.courts/wps/portal/ or https://secure.courts/https://secure.courts/https://secure.court
- 2. If you have not already done so, register to use the eFiling System.
- 3. At your discretion, download the Viewer.
- 4. After you receive the email containing your password, **login to the eFiling System**.
- 5. Change your initial password by updating your Profile.
- 6. Open the Generic Cover Sheet form.
- 7. Fill in the Generic Cover Sheet form.
- 8 . Add attachments to the form as needed. The total file size for attachments cannot exceed 5MB.
 - a. Initial Claim Attachments should include the following PDF documents: Claim of Appeal, Jurisdictional Checklist, Calendar Entries, Judgment or Order, Evidence of Ordering Transcript.
 - b. Existing Case Attachments might include: Briefs, Docketing Statement, Motions, Stipulations, Answers, or other Miscellaneous items.
- 9. Complete the Proof of Service page of the Generic Cover Sheet form.
- 10. Electronically sign the Generic Cover Sheet form.
- 11. **Submit the filing** to the eFiling System.
- 12. Provide your billing information to pay the filing fees.
- 13. You will receive an email confirmation that the eFiling was received by the eFiling System and your filing will be forwarded to the Court of Appeals.
- 14. After the Court reviews your filing, you will receive another email telling you if the filing was accepted or rejected by the Court.
- 15. Log into the eFiling System to obtain time-stamped copies of your documents that were accepted by the Court. Mail the appropriate number of copies to the COA and serve opposing counsel.
- 16. You may check on the status of your electronic filings at any time by using the "My eFilings" feature.

Tips for Using the eFiling System

The following tips are provided to assist you in the most effective use of the eFiling System.

Getting Started

Always start a new filing by obtaining the most recent copy of a form from the eFiling System. Forms are revised on a periodic basis and this will ensure that you are using the latest version. In some instances where form updates are significant, older versions may be rejected by the system.

Navigating within the System

Do not use the browser Back and Forward buttons while in the eFiling System. Use of these buttons is likely to cause problems with the system. Instead, use the Previous and Next buttons on the form toolbar.

Attaching Documents

All of your attachments must be in PDF format. Attorneys will prepare required forms and documentation as detailed in the Court Rules. Existing document templates and forms may be used. Before filing, all documents must be converted by the filer to PDF format. The Court prefers to receive documents in searchable PDF, such as will result if the Adobe Acrobat distiller process is used. You can find links for Adobe Acrobat (a commercial product for preparing PDF documents) or, alternatively, an open source PDFCreator at the COA website (http://courtofappeals.mijud.net/resources/efiling.htm). PDF versions of required forms can be found on the Court of Appeals forms page (http://courtofappeals.mijud.net/resources/forms.htm)

Saving and Submitting Forms

Use the Save option often while working on forms. System interruptions can occur and saving a copy of a form directly on your own PC will minimize the risk of loss of your work.

The eFiling System does not automatically save work in progress. Make certain you save or complete your transaction with eFiling before logging off.

You Must Refresh The Form Before Saving It. The refresh button is located at the upper left of the screen and looks like this:

After a form is submitted it can no longer be modified within the eFiling System. After a transaction is completed, you will only be able to access a PDF version of your form through eFiling. This PDF version will be "read-only"; you will not be able to modify it. This is another reason why you should save a copy of each form on your PC.

Pop-Up Blockers

The eFiling System uses popup windows for several functions such as the terms and conditions for eFiling, password rules, and printing a form when the Viewer software is not installed. If you are using popup blocker software, these windows may not display.

Screen Settings

A standard 17-inch monitor is ideal for use of the eFiling system. If you are using a 15-inch monitor, you may need to reset the screen properties to a higher resolution so that you can see more of the form on the screen.

Technical Difficulties

You may encounter technical difficulties while using the system. If possible, retry the function you are were attempting. If the problem persists, logout of the system, close the browser, open a new browser session, and retry the function.

If you still encounter the problem, capture whatever information you can about the problem (eFiling Confirmation number, error messages, screen prints, etc.) and provide that information when contacting eFiling support.

Your Work Session

VERY IMPORTANT * * VERY IMPORTANT * * VERY IMPORTANT

The eFiling System will automatically log you off the system after a one-hour period of system inactivity. System activity is activity such as selecting a menu option, searching for a form, refreshing a form, submitting a form. System inactivity includes activity within a form such as filling out the form, adding attachments, signing the form.

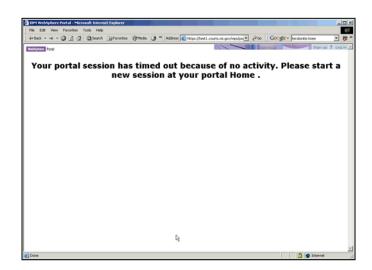
Therefore, it is CRITICAL that you occasionally save your form while it is in progress. .

If the system times out, due to inactivity in the system, you will see a message such as the following.

In that case, you will need to perform the following steps:

- 1. Close your browser window.
- 2. Access the eFiling system.
- 3. Login to the eFiling system.
- 4. Re-open an in-progress form file that you saved to your own computer.

Note: The portal timeout may occur in either the Viewer or browser mode.



Getting Started: The eFiling Home Page

Access the eFiling System

This system is designed to be used by both attorneys and support staff who will open appeals or make filings. The first step in using the eFiling System is to access the Homepage.



Capabilities offered at the eFiling System home page

- 1. Open Internet Explorer. In the browser's Address Bar, enter the eFiling URL (https://secure.courts.michigan.gov/courts/wps/portal). (Note: Internet Explorer is the only web browser that will work properly with the eFiling forms.)
- 2. The eFiling home page displays.

The eFiling home page provides information about the eFiling System. It also provides the following capabilities:

Form Search enables non-registered filers to access some of the same court forms that are used in eFiling, but with the intent of filing the forms on paper.

Register for eFiling enables a non-registered person to sign-up to use the eFiling System for electronically filing case documents.

Download Viewer installs free Viewer software to enable more functions when dealing with forms.

Forgot Password? enables a registered filer to obtain their password by providing registration information.

Login enables registered filers to access the eFiling System to access court forms, electronically file case documents, check on the status of their electronic filings, or print filed documents.

Register with the eFiling System

Filers who want to submit filings electronically must first register with the eFiling System. Registration is necessary in order to provide secured access to the eFiling System and allow the eFiling System to contact you via email regarding the status of your submissions.

Notes:

- Only those who will "sign" eFiling forms and pleadings should register on the system. Generally, only attorneys or individuals proceeding in propria persona are authorized to sign court documents. Support staff will not register under their own names.
- The First Name, Last Name and Middle Initial that is supplied during registration will appear as the "signature" when a form or pleading is submitted through the eFiling system.
- During registration, a Username must be specified. That name will be used to log in to the eFiling System. It can be shorter than the related "signature" name.
- If you ever forget your password, you will need to recall the Hint question and the Hint answer that you select in the registration process. You may want to jot down the Hint question that you select and keep it in a handy place; the eFiling system will not prompt you with the specific question you selected during registration. If you ever need to request a new password or update your profile, you will need to select the hint question and enter the hint answer.



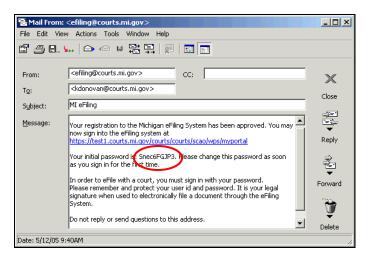
- 1. From the eFiling home page menu bar, click the Register for eFiling option. The Registration screen displays.
- 2. **Fill in all of the user registration information.** Be sure to fill in all of the required fields; these are indicated on the screen by yellow shading and an asterisk (*) preceding the field label
 - The information provided in the registration screen is critical to your use of electronic filing. This information is necessary to identify and contact you throughout the electronic filing process.
- 3. Click "Please Click Here for Terms and Conditions" to review the terms and conditions for use of electronic filing. (Refer to Appendix D: Registration Terms and Conditions on page 57.)
 - If you agree to the terms and conditions for electronic filing, click the checkbox.
- 4. **Click the Submit Form button** to complete the registration request and submit your registration for approval.



A message displays to confirm that your registration has been received and that your initial password will be sent to the email address provided.



5. **Check your email.** You will receive an email that contains your initial password. This usually occurs within an hour or less of registering with the eFiling System.



You can copy the assigned password from the email you receive. Then you can paste it into the eFiling system when you login to the system.

You will most likely want to update your profile with a password that you choose.

6. Log on to the eFiling System and change your password as soon as possible by updating your Profile. Note that your new password will be case sensitive.

Login to the eFiling System

In order to eFile you must first login to the eFiling System. This section will describe the Login steps.

1. Access the eFiling System home page. (https://secure.courts.michigan.gov/courts/wps/portal).



2. From the menu bar, click the Login option.



3. Type in your Username and Password.

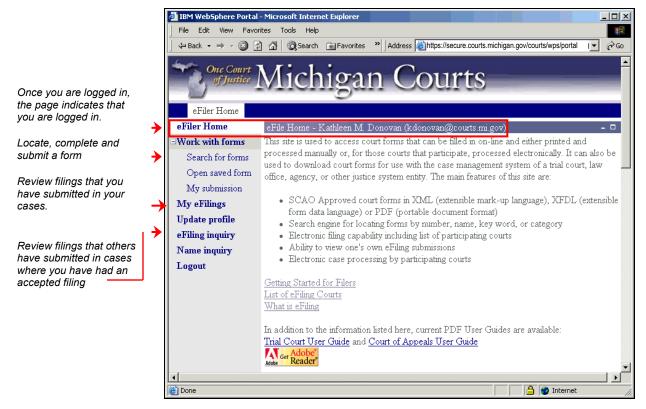
Notes:

- Your Password is always case sensitive but the username is not.
- It is possible to login multiple times under a single ID but it is not recommended.
- There is a lock out after multiple unsuccessful attempts to log in. If you are locked out, please email COAeFileTraining@courts.mi.gov with a request to have your eFiling password reset.

4. Click the Login button.

5. Your personal eFiling home page displays.

From this page you can update your user profile information, access court forms, create and submit a filing, or review filings that you have already submitted.



Note: When you enter your username and password, you may get a message that the password does not work. Double-check that you have correctly entered the username and the casesensitive password.

Update Your Profile

The My Profile screen allows you to update the information that you provided during registration. This screen also allows you to change your password.

You must be logged into the eFiling System to access this function.

1. From the menu bar, **click the Update Profile option**. The Update Profile screen displays.



2. Update the registration information, as needed.

Note: The hint question that you select should be the one you chose during the registration process. All hint questions are presented; you will need to remember which one you used when you originally created the account.

Note that there are specific "Password Rules." For instance, the minimum length of the password is <u>8 characters</u>. The password cannot be entirely alphabetic characters or numeric characters; it must include at least 4 alphabetic characters and 1 numeric character.

3. Click the Submit button to save the changes.

Refer to <u>Appendix C: Request Your Password</u> on page 55 in this User Guide for the procedure if you forget your password and are unable to login to the system.

Access a Form to Start an eFiling

This section describes how to locate the desired form.

1. From the menu bar, click the Search for forms option.



- 2. You can search for a form using one of many criteria types. Enter or select a value to use in the search. For example, Category "Court of Appeals" has been selected in the screen shown below.
- 3. Click the Search button.



4. In the e-File section of the screen, **click the Open button** to display the form.



Note:
If you are
not
logged in,
you will
get an
error
message
that no
forms
were
found.

View the Form

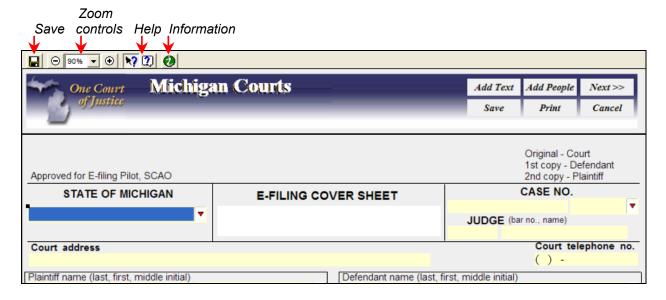
There are two options for viewing the electronic forms. You can work with the form by using:

- *The form Viewer*. You can download the Viewer software at no charge to work with the Michigan eFiling electronic court forms more efficiently. The Viewer is available on the Michigan eFiling homepage.
- *Internet Explorer*. This is the only browser supported for the State Courts eFiling application.

We recommend that you install the optional Viewer software on your PC. This software reduces the number of interactions between your PC and the eFiling System over the Internet, which typically reduces lag time for many functions.

The Viewer

Pairing the PureEdge Viewer software with your Internet browser will facilitate the efficient use of the Michigan eFiling electronic court forms. This software operates as a browser plug-in to work with eFiling forms.



If you are unsure whether you are using the Viewer or a browser, open a form and look at the toolbar displayed just above the Form toolbar.

If you are using the Viewer:

- 1. You will see the Zoom controls on the toolbar.
- 2. When you click the Information button to display the About information, it will indicate the version of the Viewer currently in use.

To obtain a copy of this software, access the eFiler home page and click the Download Viewer link. (For detailed information on how to download the Viewer, refer to <u>Appendix B:</u> <u>Download the Viewer</u> on page 53 in this User Guide.)

The Browser

The eFiling System can be used with Internet Explorer – version 6.X or higher. No additional software is required to work with the forms.

This option provides the same functionality as the Viewer, but it will operate slightly differently due to the need to communicate directly with the eFiling System on a more frequent basis.



If you are unsure whether you are using the Viewer or a browser, open a form and look at the toolbar displayed just above the Form toolbar.

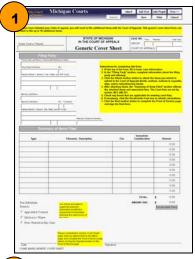
If you are using Internet Explorer only:

- 1. You will see the Refresh Form button on the toolbar.
- 2. When you click the Information button to display the About information, the About PureEdge dialog box includes PureEdge Webform Server (PWS) in the title or description.

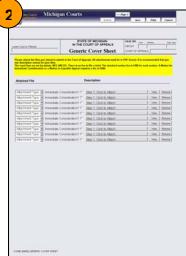


Filing a COA Form

The Generic Cover Sheet at a Glance

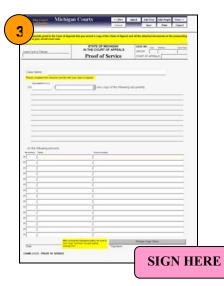


GENERIC COVER SHEET



ATTACHMENTS

- Claim of Appeal
- Docketing Statement
- Brief
- Motion
- Motion to Extend Time
- Stipulation
- Miscellaneous



PROOF OF SERVICE

Optional pages are added to the end of the form. In general, after adding an optional page, you can return to the first page of the form by pressing << Prev to go backward through all of the pages in the form.

Fill in the Generic Cover Sheet Form

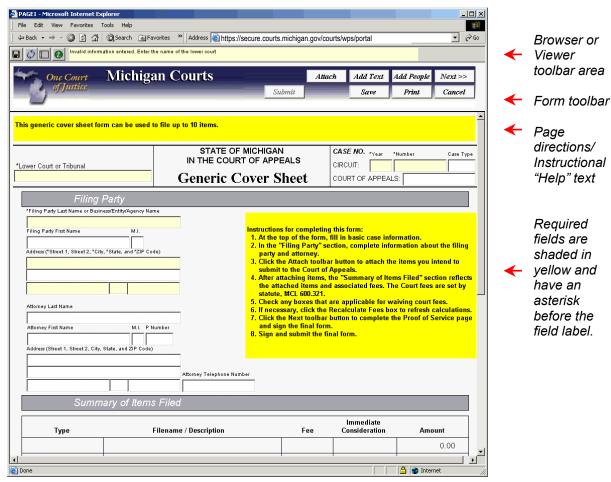
General Sequence for Working with a Form

On all forms, you will follow a sequence of steps to complete the form:

- 1. Fill in the first page of the form.
- 2. Add attachments to the form, as needed.
- 3. Complete the Proof of Service.
- 4. On the Proof of Service page, electronically sign the form.
- 5. Submit the form.
- 6. Complete billing information.

Filling in Fields of the Form

There are some features that are the same for the Court of Appeals Generic Cover Sheet, regardless of whether you are using the browser or the Viewer.



Required Fields and Navigation

The boxes on the screen represent all the fields that can be filled in on the form. Required fields are shaded yellow and have an asterisk (*) before the field label.

To move from one field to the next, press the [Tab] key.

Keep the following tips in mind when filling in a form:

Tip: Drop-Down Box Interaction

Be careful! If you don't tab out of the drop-down box before you start using the scroll wheel, the drop-down choices will still be active and you can inadvertently change your initial selection.

Tip: Check Boxes

You can add a checkmark in a box by pressing the spacebar.

Tip: Field Sizes

Sometimes, the proportional font specified by PureEdge Forms will fill the available space before the field is visually full. For example, a person's name may be cut off, or you may not have room for the entire service address on the Proof of Service page. In that case, you will need to abbreviate the information.

Tip: Date Formats for Date Fields Across All Forms

Throughout the forms, the date format is MM/DD/YYYY. You must include the forward slashes and a 4-digit year. Otherwise, your input will not be accepted.

Tip: Telephone Numbers

Telephone numbers should be entered in the (xxx)xxx-xxxx format, using the parenthesis and dash, as necessary, to make the form easier to read. However, the system will accept the input without those characters and will not automatically reformat the input.

Populating a Form

Inactive Fields. If a field is inactive, you will be unable to enter any information. This may occur with fields that are reserved for Clerk's Office use upon receipt of your filing.

Alpha or Numeric Fields. Certain fields may be restricted to either alpha or numeric data.

Placeholder Fields. Sometimes the data that you enter will show up on other places on the form. For instance, at the top of every form there is a placeholder for lower court and COA information. Once you enter information in that area, it will appear at the top of every other page of the form.



Validation in the Form

If you attempt to enter information that does not fit with what the system expects, the field will be shaded red. In addition, you may be presented with a dialog box with further directions, or you may need to look next to the browser or Viewer toolbar to see detailed Help instructions.





Save a Form

The eFiling System provides the ability to save a copy of the form to your local computer. This capability can be useful for several reasons:

- To allow you to archive your own copy of the completed form.
- To allow you to save a partially completed form for later use.

To save the form to your computer, first Refresh the form and then use the Save button on the Form toolbar.

(For detailed instructions, refer to the <u>Save a Form to Your Computer</u> section on page 40 of the User Guide.)

Tip: Security Settings

To download a file, such as the form file, you must set your Internet Explorer security settings to enable downloads.

Tip: Saving and Refreshing

When you save subsequent times, you will want to overwrite (or replace) the saved document, rather than creating multiple copies of the same work in progress.

Print a Form

To print a properly formatted version of the form that includes all the form pages, you must use the Print button on the Form toolbar while working in the Viewer. The print function will print the pages from the form but will not include the Attachment page or attached files.

Warning: The Internet Explorer Print button will not print a properly formatted version of the form.

Using the Form Toolbar

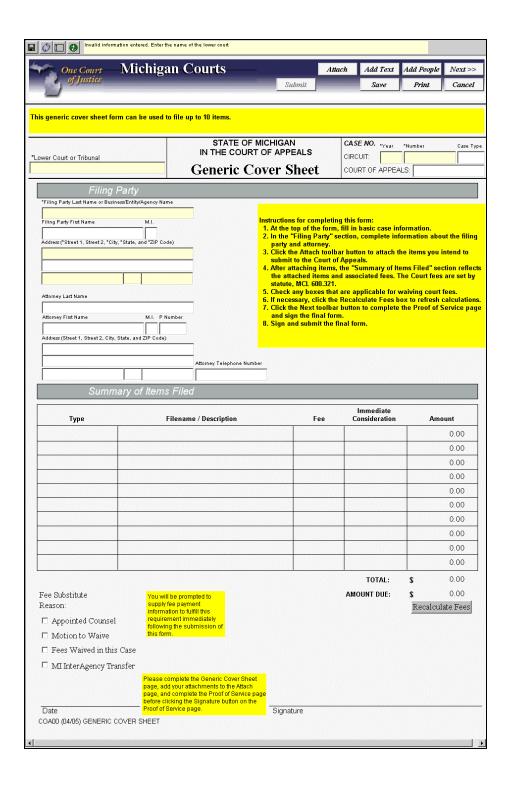
One Court	Michigan Courts	<< Prev	Attach	Add Text	Add People	Next>>
of Justice		Submit		Save	Print	Cancel

Standard Functionality Through the Form Toolbar Buttons

Button	Explanation	Notes
< <pre></pre>	Navigates backward through the previous pages of a form	Pressing this button does not automatically return to page 1. In fact, when you use this button in a multi-page form, you could see pages that you have not worked with yet.
Next>>	Navigates forward through the pages of a form	You can use this button to leave a page without completing all required fields. At the point of submission, you may be alerted that you have invalid (incomplete) values.
Attach	Enables you to add file	The attachments are secured once you have
	attachments to this form.	electronically signed the form.
Add Text	Enables you to add pages for further text	
Add People	Enables you to add form pages to allow entry of additional parties or attorneys for the case	
Save	Saves this form to your PC before submitting it.	Remember that you must Refresh the form first, using Refresh Form button on the upper left of the browser toolbar.
Print	Prints the pages of this form.	
Submit	Sends the form to the eFiling System and provides you with the option to continue with the next step of the process.	Prior to submitting it, you may want to save a copy of the form so that you can re-open it if there are problems with the system.
Cancel	Closes this form without submitting changes.	You can use this option to forfeit your work on a form, or you can save the form first and then use Cancel to exit the system.

Complete Page 1

The Generic Cover Sheet (COA00) is intended to accompany the filing of items such as claims of appeal, docketing statements, briefs, motions, motions to expedite, stipulations, and/or miscellaneous items.



BEFORE YOU ATTACH ITEMS:

Fill in basic case information.

Complete information about the filing party and attorney.

Click the Attach toolbar button to attach the items you intend to submit.

AFTER YOU ATTACH ITEMS:

The Summary of Items Filed is automatically filled in with the items and fees.

Check any boxes that are applicable for waiving court fees.

Refresh Fees, if necessary.

Press the Next>> button to continue with the Proof of Service page, where you can sign the form.

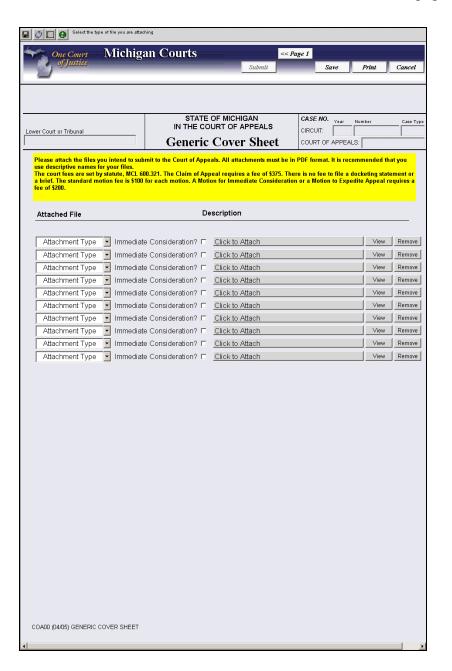
Attach Items to be Filed

Attach Files

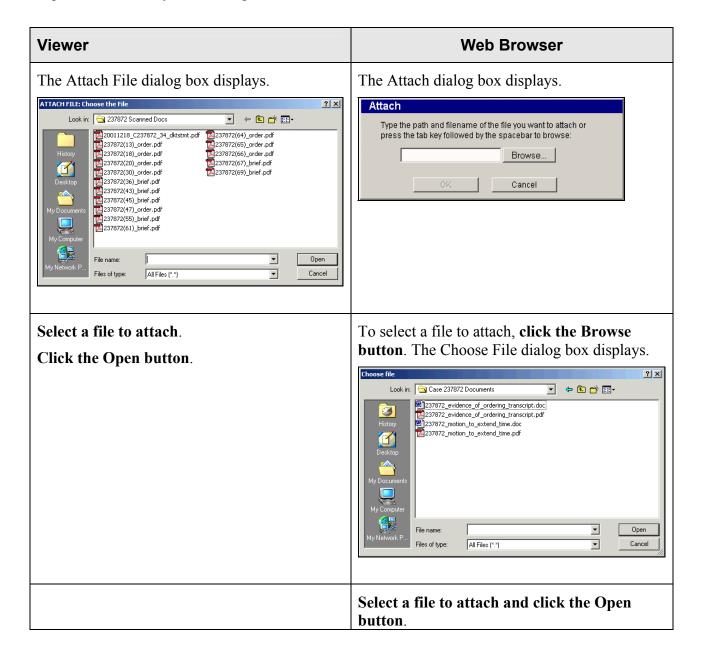
At this point, you may be ready to attach files, although you can do this at any time during the form completion. The Attachments page provides you with all of the options you will need to attach, view, and remove PDF documents. (Note: You cannot attach files after you sign the form. In order to do so, you would need to un-sign the form and then attach the files.)

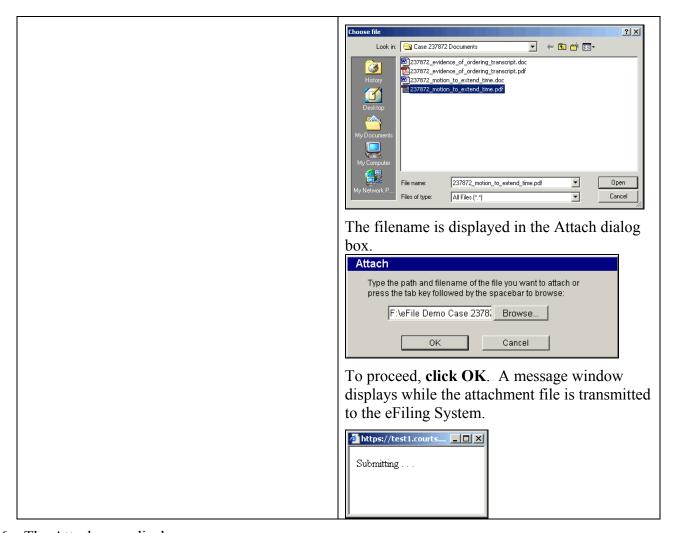
From an open and UNSIGNED form:

1. In the Form toolbar, **click the Attach button**. The Attach page displays.

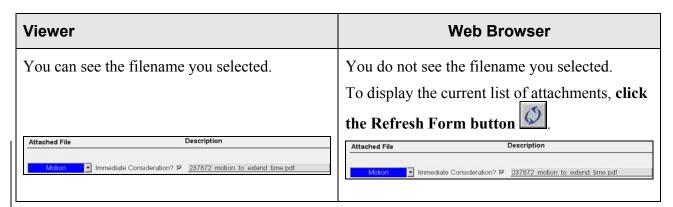


- 2. From the Attachment Type drop-down list, select the appropriate document type.
- 3. Check the Immediate Consideration checkbox if you are also filing a motion for Immediate Consideration. (The fee is \$200.)
- 4. To select a file from your own directory to attach to the form, click the Click to Attach button.
- 5. The Attach File page works differently between the Viewer and the browser. The next steps depend on whether you are using the browser or Viewer with forms.

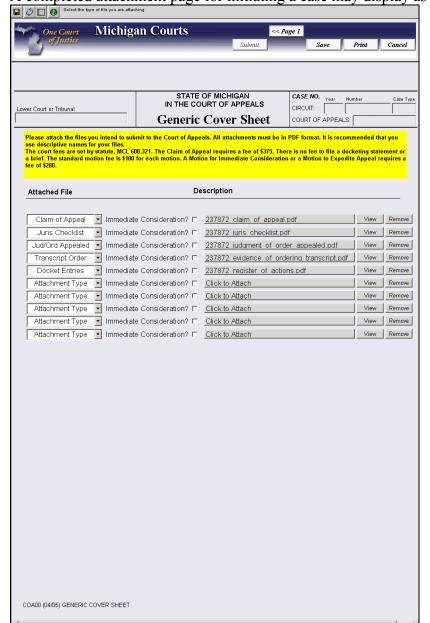




6. The Attach page displays.



- 7. **Repeat steps 5 and 6** as needed, to add the desired attachments to the form.
- 8. **Click the <<Page 1 button** to leave the Attachment page and return to Page 1 of the form.



A completed attachment page for initiating a case may display as follows:

Use a descriptive label when naming your files. If you have a case number, you should include that. If not, use a reference to a case name as part of the filename.

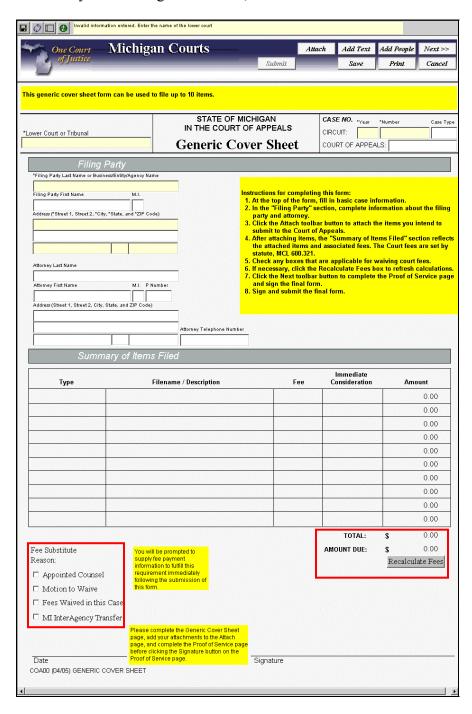
Notes:

- All of your attachments must be in PDF format. The Court of Appeals does not accept any other document format. The Court encourages searchable PDF format to enhance judicial and staff attorney use of the submissions.
- There is a 5 MB limitation on the cumulative file sizes that are allowed to be submitted.
- You must attach files prior to electronically signing a form because the electronic signature will secure the attached files against modifications.

Adjust Fees

The Generic Cover Sheet form includes an area where you can supply fee payment information. If you have reason for a fee substitute:

- 1. Check the box that indicates your reason.
- 2. If you are using the browser, **check the Recalculate Fees button**.



Note: If it is later determined that you do not qualify for a fee waiver, then a fee will be assessed at that time.

Complete Proof of Service

You must provide proof to the Court of Appeals that you have served (or will immediately serve) a copy of all the attached documents on the other parties in your case.

One Court	Michiga	n Courts	<< Prev	Attach	Add Text	Add People	Next>>
of Justice			Submit		Save	Print	Cancel
_							
ust provide proof to	the Court of Appe	als that you served a copy of the	e attached docu	ments on a	II parties.		
		STATE OF MIC IN THE COURT O			ASE NO. Year	Number	Case Type
er Court or Tribunal		Proof of S	ervice		OURT OF APPE	ALS:	
		11001012				-	
Dase Name: 'lease complete this cl	necklist and file with	your claim of appeal.					
Date (MM/DD/YYY)							
On	. 1	one copy	y of the followi	ng docum	nents:		
on the following p	ersons:						
ar Number *Name		*Service Address					
	After click	king the Signature button, be sure to		PI	ease Sign He	re	
Date	click"Sig	n" and then "Accept" before OK".	*Signature	ı=ı	odoo olgii ille	,, ,	
							OD 7 30 (/O)
A00 (04/05) PROOF	UF SERVICE					M	CR 7.204(C)3
							1

Enter the Case Name.

Enter the Date and the method of service.

The list of documents will be automatically generated and include the names of all attached files.

Provide the name and service address of every attorney or party served.

You can list up to 15 individuals who are being served.

SIGN THE FORM

(The Date field is automatically filled in when you sign.)

Complete the Form Process

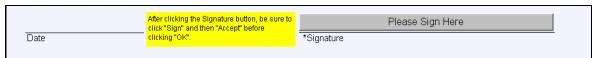
Sign the Form

A form must be electronically signed before it can be submitted to the eFiling System. When you electronically sign the form, you do the following:

- ✓ Confirm that you accept responsibility for the information entered and the attachments provided in the form
- ✓ Secure the form from tampering.

Notes:

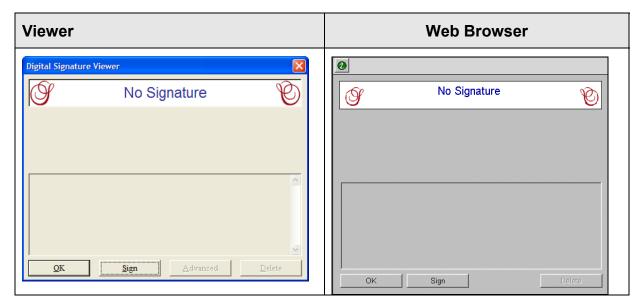
- We recommend that you check the form for all required fields prior to signing, to avoid errors in the submission process.
- Once you sign a form, you can delete the signature to un-sign the form and continue to edit the form. Deleting a signature can only be done prior to submitting a form.
- 1. When a form is complete (all information is filled in and attachments have been added), click the Please Sign Here button on the Proof of Service page.



Note: If you are using the browser, you may be directed to click the Refresh Form button

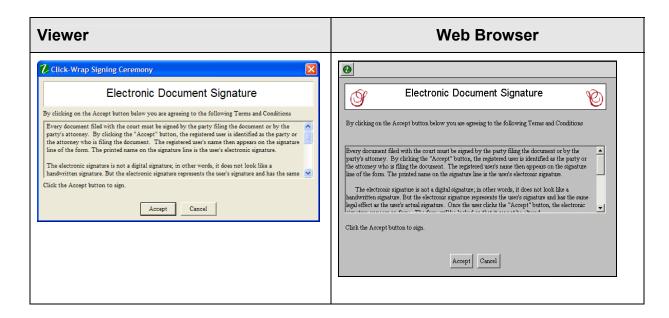


2. The signature dialog box displays; it indicates if the form has been signed. To continue with the electronic signature process, click the Sign button.

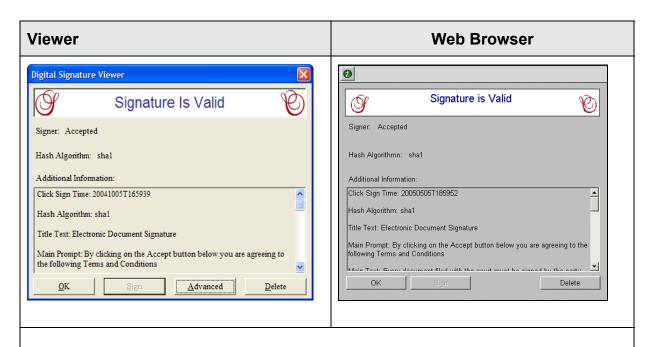


Note: Clicking the OK button before signing, will return to the Proof of Service page in the event that you do not want to continue with signing the form.

3. From the dialog box that displays, **review the "Terms and Conditions" on the screen.** If you agree with the Terms and Conditions and wish to continue, **click Accept**.

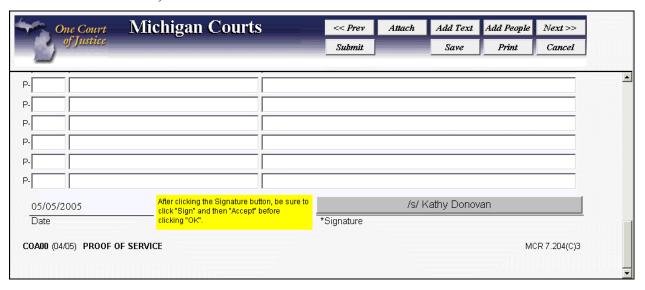


4. A dialog box will display, indicating that the digital signature was accepted. To proceed with the submission of the filing, **click OK**.



Note: This screen displays programming language. It is not critical that you understand the text. It is displayed during the pilot phase of the project to assist project programmers in the investigation of errors.

- 5. When you return to the form, **notice the following changes**:
 - The text on the signature button on every page of the form is updated to indicate that the form has been electronically signed.
 - In the Form toolbar, the Submit button is now enabled.



VERY IMPORTANT * * VERY IMPORTANT * * VERY IMPORTANT

At this point, you have signed the form, but it still needs to be submitted to the eFiling system.

Submit the Form

Once you sign the form, you are able to submit it to the eFiling system. Signing and submitting the form are two separate processes.

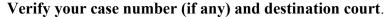
Once you electronically sign the form, the Submit button is then enabled. You can submit the form to the eFiling System by clicking the Submit button from the Form toolbar. You will receive acknowledgement from the system that your form has been received and, eventually, further acknowledgement that your form has been accepted.

After a form is submitted it can no longer be modified within the eFiling System. You will only be able to access a PDF version of your form through eFiling after submission has completed.

VERY IMPORTANT * * VERY IMPORTANT * * VERY IMPORTANT

If you log out, or allow your session to expire prior to proceeding to the payment screen, your filing will be deleted and your filing will not be sent to the court. As a safeguard, be sure to save your work in progress to your own computer.

- 1. **Click the Submit button** to submit the form to the eFiling System.
- 2. After submitting a form, the following screen displays to confirm the filing fee and provide the opportunity to edit or remove the form if needed.



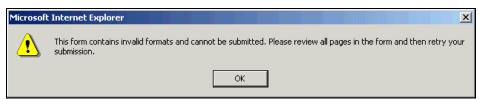


- 3. You now have several options.
 - Continue: Click Continue to continue with the submission by moving to the Payment screen.
 - Edit: Click Edit to return to the form. The form opens to the first page. You must un-sign the form in order to make any changes. To do so, locate the Signature button (on the Proof of Service page) and click the Signature to un-sign the form.
 - Remove: Click Remove to remove the form from the submission process.
- 4. To proceed with the submission process and finalize the eFiling, click the Continue button.

VERY IMPORTANT * * VERY IMPORTANT * * VERY IMPORTANT

If Your Form Cannot Be Submitted Because Required Fields are Incomplete

It is possible to sign a form as long as all required fields are filled in on the Proof of Service page. That is to say that the required fields on the other form pages can be left blank and you would still be able to sign the form. However, you will not be able to submit the form in that state. In that case, you will receive a message such as the following:



In that case, you will need to do the following:

- 1. Un-sign the form.
- 2. Review the pages in the form to locate missing or invalid information. Most likely, you will notice a required field has been left blank. (It will still be shaded yellow).
- 3. Fill in the required information.
- 4. Sign the form again.
- 5. Submit the form.

If Your Form Cannot Be Submitted Because of File Size

If your submission exceeds the 5 MB file size limit, you will not be prompted for payment information. Instead, the system will stop at the submission summary screen with an error message displayed.



In that case, you have a couple options:

- 1. If you saved the form to your computer prior to signing or submitting, you can open the saved form, un-sign the form (if necessary), and remove some of the attachments.
 - a. If you are attempting to eFile multiple PDF documents in a single transaction, consider splitting your single transaction into multiple transactions.
 - b. If you are attempting to eFile a brief with several large appendices included, separate the appendices into their own documents.
 - c. If a single PDF document, such as a brief, in and of itself is larger than 5 MB, then you may need to split the PDF file into several parts and submit each part on its own (Part 1 of 2), (Part 2 of 2).
- 2. If you have not saved the form to your computer prior to signing or submitting, you will need to search for the cover sheet form again and start from scratch. This time, keep in mind the 5 MB limit for attachments.

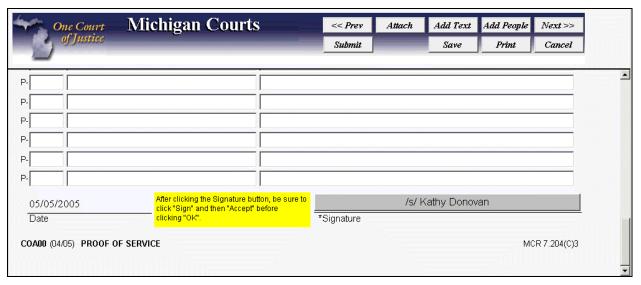
5 MB is the limit for an entire submission. The submission includes the cover sheet form and all attachments, which will inevitably be larger than the individual attachments totaled collectively. If you have concerns that a submission might exceed the limit, you may wonder if there is any indication onscreen. At this point, the system alerts you only when you attempt to submit the large file. Keep in mind, however, when you save the file, you should be able to see the size of it by looking at the file properties.

If you find that you frequently have large submissions, you might find it useful to complete all the basic fields in the form and then save that form to your computer. You can then open the completed cover sheet form and attach individual files. Completion of the form is already complete for each subsequent submission.

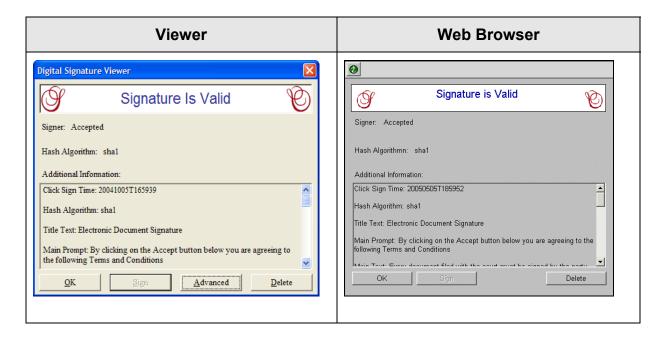
Unsign the Form

Once you sign the form, you are not able to edit it. In a sense, it is "locked down." To make any changes or fixes, you must remove your electronic signature from this form.

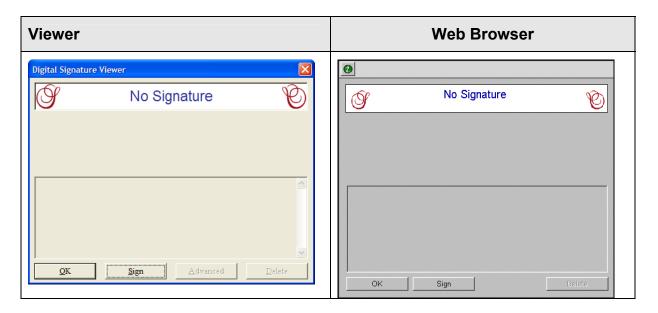
1. Click the signed Signature button.



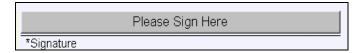
2. A dialog box displays indicating that the digital signature is valid. To proceed with removing the signature, **click Delete**.



3. The signature dialog box displays indicating the form no longer has a signature attached. To continue, **click OK**.



When you return to the form, the signature button is available again.



Provide Payment Information

After a form has been filled in, electronically signed, and submitted, the required filing fee must be paid.

1. If the filing requires the payment of a filing fee, the following screen displays. **Provide the required payment information**.



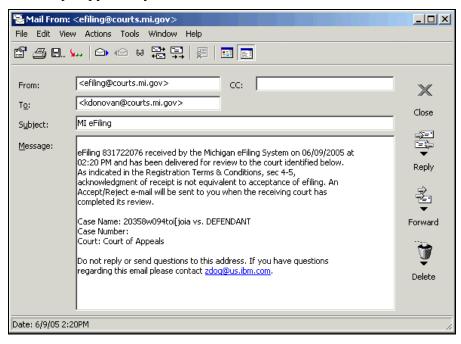
- 2. Click the Finish button.
- 3. The following screen displays to confirm that your eFiling submission was received successfully. You will also receive a confirmation email.
- 4. At your discretion, **right-click and print this confirmation screen**. You can include this with the paper "courtesy copy" that you file with the court.



At this point, you have successfully submitted the form. However, the Court of Appeals has not yet confirmed jurisdiction or conformity with the Court Rules.

5. Click Done

6. At your discretion, **print the confirmation email.** You can include this with the paper "courtesy copy" that you file with the court.



- 7. Notice that the Filing Summary screen displays. You now have an opportunity to print the submitted form and attachments.
 - To print the submitted form, click the Form Name (which is listed in the Forms Summary area).
 - The PDF version of the form opens. You can print the document(s) for your files, as well as the copies to mail to the COA and copies to serve on the parties.



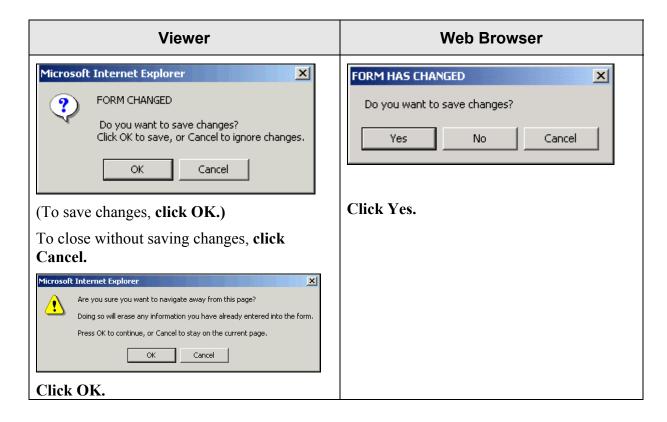
8. Click Search Again to return to the Forms Search screen.

Manage Your Forms

Cancel a Form

While you are working on a form, you may want to close the form without submitting changes. In that case, you can cancel the form.

- 1. In the Form toolbar, Click Cancel.
- **2.** You will be prompted to save changes.

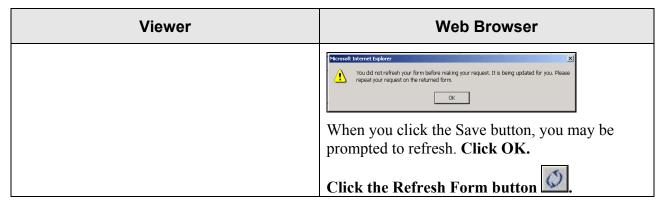


You will remain logged in to the eFiling system and will return to the Form Search screen.

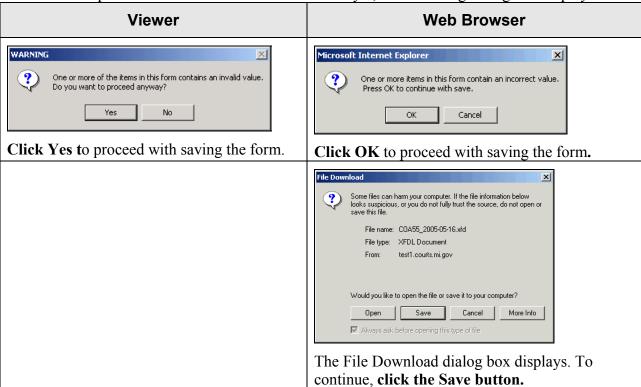
Save a Form to Your Computer

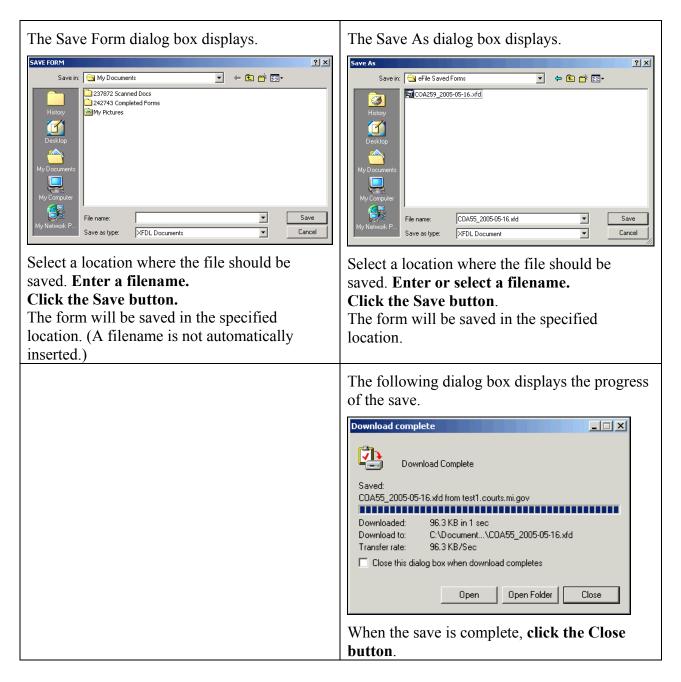
The eFiling System provides the ability to save a copy of the form to your local computer. This capability can be useful in several ways:

- To save a copy of the completed form for archival purposes.
- To save a partially filled-in form that will be completed in the near future.
- 1. On the Form toolbar, click the Save button.



2. If there are required fields that have not been filled in yet, the following dialog box displays.





The saved forms will have an .xfd extension. A typical naming convention might include the form name or number, case number, and the date, as in Cover 123456 2005-06-20.xfd.

For detailed instructions on opening a saved form, refer to the Open a Saved Form section on page 44 of the User Guide.

Warning: Forms are revised on a regular basis and depending upon the extent of the changes, older revisions of the forms may no longer be accepted by the court. It is recommended that partially filled in forms be completed within a reasonable time period and that you create new filings from forms retrieved directly from the eFiling System, not from a locally saved copy.

Print a Form

To print a properly formatted version of the form that includes all the form pages, you must use the Print button that is in the Form toolbar. The print function will print the pages from the form, but will not include the Attachment page or attached files.

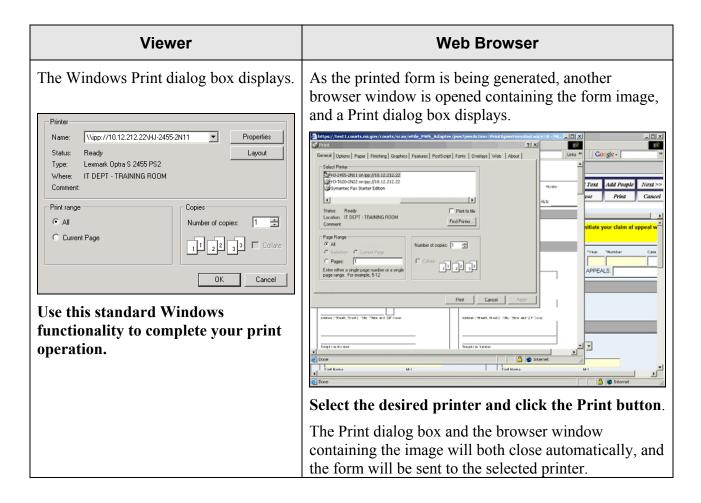
Note the Internet Explorer the print button will not print a properly formatted version of the form.

Note for Internet Explorer users: Note that the browser print settings (including margins, header, and footer) will affect the print format. These settings may vary depending upon your selected printer. Changing these browser settings will change the print options for all printing through your browser. Typical settings are: No header, No footer, Left margin = 0.375", Right margin = 0.25", Top margin = 0.5", Bottom margin = 0.25".

1. In the Form toolbar, click the Print button.



2. The next step depends on whether you are using the Viewer or the browser.



Note: If you attempt to print a form that has not been completed, you will get a warning that the form contains an invalid value. Click Yes to bypass the warning and continue with the printing.



Open a Saved Form

This feature of the eFiling System allows you to resume working from a form that was saved to your local computer. The saved forms will have an .xfd extension.

Notes:

Forms are revised on a regular basis and depending upon the extent of the changes, older revisions of the forms may no longer be accepted by the court. Therefore, it is recommended that partially filled in forms be completed within a reasonable time period and that you create new filings from forms retrieved directly from the eFiling System, not from a locally saved copy.

When you retrieve a saved form, the system will verify that the form itself has not been altered and will prevent an altered form from being used by the eFiling System.

A saved form can be submitted more than once. However, each submission of the form will be considered a separate filing and filing fees will be charged for each separate electronic filing.

- 1. From the eFiling home page, click the Open Saved Form link.
- 2. The following screen displays.



- 3. Click Browse to locate the saved form.
- 4. Select the desired form. Click Open.



5. The form name displays in the Browse box. **Click Open.** The selected form opens in the current window.

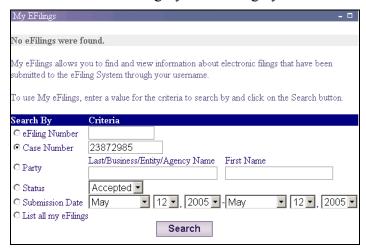


eFiling System Inquiries

View eFilings You Have Submitted

The "My eFilings" option allows you to list eFilings that you have submitted through the eFiling System. There are several search options to assist you with finding an eFiling.

1. From the menu bar, **click the My eFilings link**. The My eFilings screen displays. My eFilings allows you to find and view information about electronic filings that have been submitted to the eFiling System through your username.



2. The corresponding radio button for the last value entered will automatically be selected. **Enter or select a value to search by**.

Notes:

- You may only search based on one criterion at a time.
- You may inquire by a specific case number. Keep in mind that although there may be eFilings in the system, you are only authorized to view eFilings submitted through your username for this case. The message may indicate, "No eFilings were found." More directly, you may not be authorized to view filings for that particular case.

3. **Click the Search button** to start the search. When the search is complete, the results list displays.



4. Click the eFiling Number link to view details about the eFiling or to access images of the eFiled documents.



5. **Click the form name or attachment link** to display an image of the document. The image displays in a separate window.

Note: To return to the previous screen, use the Back to Results button. The browser Back button does not work.

View All eFilings for a Case

If you have at least one accepted eFiling on a case, the eFiling Inquiry option will allow you to view <u>all eFilings that have been accepted on that case</u>, regardless of who submitted the eFiling. This will allow you to view accepted eFilings that were submitted by other parties on the case.

In terms of this feature, keep in mind that there is a connection between the parties and their ability to view the case information in the system. Only registered users that have an accepted eFiling on a case may view an eFiling on that case through the eFiling System.

1. From the menu bar, **click the eFiling Inquiry option**. The eFiling Inquiry screen displays.



2. In the Case Number field, enter a case number.



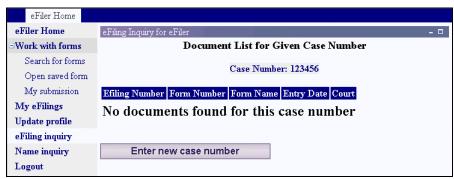
3. Click the Continue button. The list of eFilings displays.



- 4. To view a document, **click the name of the document**. The document displays in a separate window. You will notice that a timestamp has been added to your documents. You may open multiple documents concurrently.
- 5. To close a document, click the Close button.
- 6. Click the Enter new case number button to inquire on a different case.
- 7. To return to the previous screen, **click the Back to Results button**. The browser Back button does not work.

Note: eFiling Inquiry When Status is Pending

If a filing has not yet been accepted by the Court of Appeals, you may receive the following message. When the filing is accepted, you will be able to access it through the eFiling Inquiry feature.



Access the COA Case Inquiry Screen

The Name Inquiry function provides access to the Court of Appeals web-based case inquiry system, which is also available through the Michigan Court of Appeals website. The Case Inquiry system allows users to look up cases by attorney or party name, or by case number. The system provides access to full public docket sheets, including links to PDF copies of orders and opinions.

1. From the menu bar, **click the Name inquiry option**. The Name Inquiry screen displays. It contains links for each court that provides a web-based case inquiry function that has been configured in the eFiling System



2. Click the Court of Appeals link.



The Court of Appeals web-based Case inquiry function displays in a new browser window.

The Case Inquiry System allows for broad public access to electronic Court records. There are three methods available for searching: Docket Number Inquiry, Party Name Inquiry, and Attorney Case List.

- 3. Click on one of the links to select a Search method.
 - Use the <u>Docket Number Inquiry</u> to locate the Court docket sheet for a specific docket number. The docket number is also known as the case number. Once the search is complete, the docket sheet for that docket number will be displayed.
 - Use the <u>Party Name Inquiry</u> to locate the Court docket sheet for a specific party name. The party name can be the name of an individual or organization. Once the search is complete, the Name Inquiry screen will display. Scroll through the list of matching cases. To access a particular docket sheet, click the docket number of the case you are interested in.
 - Use the <u>Attorney Case List</u> to locate the Court docket sheet for a specific attorney. You can search based on either attorney bar number or attorney name. Once the search is complete, the resulting attorney case list will be displayed in descending release date order. Scroll through the list of matching cases. To view the Court docket sheet, single click on the desired docket number link. The docket sheet will open.
- 4. **Follow the prompts** to use the Search capabilities within the Case Inquiry system.
- 5. To return to the eFiling portal, close the Case Inquiry window.

Appendix A: System Requirements

Your computer must meet the following minimum system requirements in order to use the eFiling System:

- Operating Systems supported:
 - o Windows 98/ME
 - o Windows NT 4.0 sp6a
 - o Windows 2000 sp2, sp3, sp4
 - Windows XP sp1
- Hardware requirements
 - o Processor: 500 Mhz or above
 - o RAM: 128 MB or more
 - o Disk space: 40 MB (Viewer only requirement)
 - o Resolution: 800 x 600 in 16-bit color
- Software requirements
 - Microsoft Internet Explorer 6.0 SP1 or above
 - A PDF viewer such as Adobe Reader must be installed on your computer in order to view documents that have been submitted or filed. If Adobe Reader is used, version 7 or above is recommended
 - O Before filing, all documents must be converted by the filer to PDF format. This requires PDF conversion software such as Adobe Acrobat or, alternatively, the open source PDFCreator software

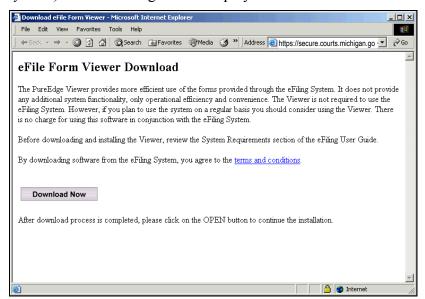
 (For further information, visit http://courtofappeals.mijud.net/resources/efiling.htm)
- Connectivity to the Internet

Appendix B: Download the Viewer

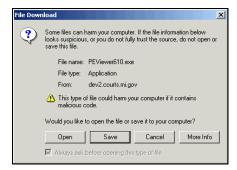
The PureEdge Viewer provides more efficient use of the forms provided through the eFiling System. It does not provide any additional system functionality, only operational efficiency and convenience. The Viewer is not required to use the eFiling System. However, if you plan to use the system on a regular basis you should consider using the Viewer. There is no charge for using the Viewer in conjunction with the eFiling System.

Before downloading and installing the Viewer, review the System Requirements section of the eFiling User Guide.

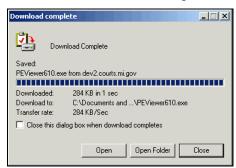
- 1. Access the eFiling System. (In the browser's Address bar, enter the eFiling URL (https://secure.courts.michigan.gov/courts/wps/portal).
- 2. From the main menu bar, **click the Download Viewer option**. (Note: The Download Viewer option is available from the main menu; it is not a menu option once you are logged in to the system.) The following screen displays.



- 3. Review the Terms and Conditions, as needed.
- 4. **Click the Download Now button** to proceed with the download. The following dialog box displays.
- 5. To proceed with the download, click the Save button. The following dialog box displays.



- 6. Select a location to save the file and click the Save button.
- 7. When the download is complete the following dialog box displays.



8. **Click the Open button** to proceed with the installation of the Viewer.

Note: After downloading the Viewer, you need to logout of the eFiling System <u>and</u> close the Internet Explorer window. Then, you can open Internet Explorer and access the eFiling System. Now, the Viewer is the mode of operation for the form environment.

Appendix C: Request Your Password

If you forget your password, you can use this feature to request your password. The System will email your password to the email address that you used to register with the eFiling System.

- 1. **Access the eFiling home page**. (In the browser's Address bar, enter the eFiling URL (https://secure.courts.michigan.gov/courts/wps/portal).
- 2. From the menu bar, click the Forgot password? option.
- 3. Enter all of the information requested on the screen.

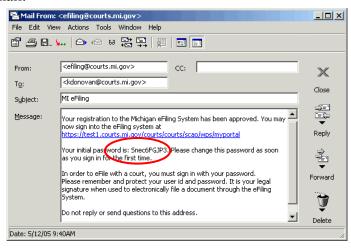


If you ever forget your password, you will need to recall the Hint question and the Hint answer that you selected in the registration process.

4. Click the Submit Form button. The system notifies you of the update status.



- 5. **Check your email.** In a few moments, you will receive an email that contains your new password for the eFiling system.
 - When you receive the email, you may want to copy and paste the password for your first-time login.
 - It is strongly recommended that you login and change your password as soon as you receive the email.



Appendix D: Registration Terms and Conditions

Registration Terms and Conditions

Michigan Courts eFiling is a service of the Michigan judicial branch. Through eFiling, you will be able to file documents electronically with participating courts. This Participation Agreement includes instructions on how to register and a description of the hardware and software you will need. Please read this Agreement carefully because it also sets forth your rights and responsibilities as a participant in the eFiling program.

1. Registration - User Name and Password

You must be registered in order to use eFiling. To register, you will need to set up an account with a username and password. You are responsible for keeping your username and password secure.

2. Terms of Use

You may begin using eFiling on the date you receive e-mail confirmation of your registration. Generally, this will occur on the same day you register.

If you violate this Agreement, the applicable court clerk may terminate your registration by written notice. The effective date of the termination shall be seven days after your receipt of the notice of termination.

By participating in eFiling, you certify that the documents you file electronically through this service are identical to any paper copies.

You must provide a valid e-mail address and current billing information. Your registration application will be rejected if you do not complete all fields as required.

Each document that you file electronically must be served on the appropriate parties. It is your responsibility to accomplish service.

3. E-mail Communication

All communications between you and the eFiling system, except as otherwise provided in this Agreement, will be via e-mail.

4. Acknowledgment of Filings

When you submit a filing, the eFiling system will immediately send you an e-mail acknowledging your filing. This message is confirmation that the eFiling system has received your filing with no technical difficulties. It does not provide any information regarding the court's acceptance of your filing or any procedural issues with your filing.

5. Acceptance or Rejection of Filings

Following acknowledgment of your filing, the receiving court will send an Accept/Reject e-mail that is your notification that your filing was either accepted or rejected by the court. The court comments in the Accept/Reject e-mail are entered by the clerk of the court that accepted or rejected the filing.

6. Electronic Signature

When you submit a document to eFiling, a window will appear that prompts you to verify that you want to electronically sign the document. Your electronic signature will be secured through your user name and password. Your electronic signature will have the same effect as your handwritten signature. Once you click on "accept" and submit your electronic signature, the document is secure. You are presumed to have read and authorized any document submitted under your electronic signature.

7. Payment

At this time, only payment by credit card is accepted for eFiling. Your electronic filing may not be processed if your credit card information becomes outdated or if your credit card company refuses to process payment. Neither the eFiling program nor the court shall be liable for any losses resulting from such refusal or from your failure to provide current credit card information.

8. Attachments

Attachments shall be in searchable pdf format and shall be limited to a total of 5 megabytes in size. Attachments in other formats will not be accepted.

9. Hours of Operation

Documents filed with the eFiling program will be processed during the normal business hours of the court. Submission of an electronic filing before the close of business does not guarantee that the court will accept the filing that day, except at the Court of Appeals where all electronic filings will automatically be accepted pending later review for jurisdiction and conformity to pertinent court rules. In all other courts, the Accept/Reject e-mail is your notification that your filing was either accepted or rejected by that court. At the Court of Appeals, filing defects will be communicated to the parties through that court's standard process.

UNINTERRUPTED ACCESS IS NOT GUARANTEED. Like any Internet-based service, eFiling may be unavailable from time to time due to demands on the system, the need to perform repairs, and other causes.

10. Security

Your access to the eFiling system is limited to filing and reviewing documents electronically. You may not attempt to obtain access to court records or files that are inaccessible to the public under a court order. You may not attempt to alter any documents already filed. Upon any such use or attempted use, your registration will be terminated immediately.

11. Liability

You are personally responsible for the use of your username and password. Any electronically filed document associated with your username and password, and confirmed by your electronic signature, will be conclusively presumed to have been read and authorized by you. You accept responsibility for any unauthorized use of your username, password, or electronic signature. If you believe that your username, password, or electronic signature have been used by someone other than you or your authorized employee, you should notify a participating court immediately.

12. Hardware/Software

You must have Internet Explorer version 6.x or above. In addition, you must have software that will allow you to convert a word processing document into a searchable pdf document. You are responsible for all Internet access service charges.

Disclaimers of Warranties

1. Warranty Exclusion.

The Michigan judicial branch makes no representations or warranties of any kind, including but not limited to the warranties of fitness for a particular purpose or merchantability, nor are any warranties to be implied, with respect to the information or services made available.

2. Accuracy and Completeness of Information.

Without limiting the generality of the preceding paragraph, the Michigan judicial branch makes no warranties as to the accuracy or completeness of the information submitted via eFiling. The Michigan judicial branch, its officers, agents and employees, are not liable for any damages resulting from inaccurate or incomplete information or any other information submitted via eFiling.

3. Exclusion of Damages.

The Michigan judicial branch, its officers, agents, and employees, shall not be liable for any lost profits or savings, or for special, indirect, incidental, or consequential damages of any kind whatsoever, regardless of the form of action, whether in contract or in tort, including negligence, relating in whole or in part to your use or inability to use eFiling, even if the Judiciary, its officers, agents, or employees, have been advised of the possibility of such damages.

Appendix E: Electronic Filing Guidelines

Michigan Court of Appeals Electronic Filing Guidelines

Effective June 20, 2005

The Guidelines were developed for use during the Court of Appeals electronic filing pilot project, and they are subject to change as circumstances require. The Guidelines will be posted on both the Michigan Courts eFiling website and on the Court of Appeals private webpage as Appendix E to the Court of Appeals User Guide.

- 1. **Scope of Electronic Filing Pilot Project.** The electronic filing pilot project is applicable on a voluntary basis only for appeals (pending or newly filed) arising from orders entered by the Michigan Public Service Commission. Electronic filings in any other type of case will be rejected. To qualify as an electronic filing under these Guidelines, such filings must be made through the Michigan Courts eFiling website at https://secure.courts.michigan.gov/courts/wps/portal.
- 2. **Registration for Use of the Michigan Courts eFiling System.** Nothing in these Guidelines is intended to conflict with the Terms & Conditions for Registration that are posted on the Michigan Courts eFiling website. Registration with the Michigan Courts eFiling System is only authorized for attorneys or parties *in propria persona* in MPSC cases.
- 3. **Applicability of Michigan Court Rules.** Nothing in these Guidelines is intended to conflict with the Michigan Court Rules. For example, filing deadlines, fee payment requirements, service requirements, and copy requirements are retained until further notice.
- 4. **Filing.** Delivery of a document to a court clerk will be accomplished when an electronic filing has been received by the Michigan Courts eFiling System and the filer has received confirmation that the filing will be forwarded to the Court of Appeals for processing. On the same day that a filer submits an electronic filing, the filer must also *initiate* delivery to the Court, by first class mail or otherwise, of an original *and as many copies* of each filing as are required by the court rules. Such paper copies are to be reproduced from the PDF documents as they were submitted electronically to the Court, with the intent that the paper copies are identical to the electronic versions.
- 5. **Official Record**. As permitted by the Uniform Electronic Transactions Act, MCL 450.837, the electronic filing will be the official record of the Court. The printed copy of the electronic filing that is provided by the filer as required in section 4 will be a paper representation of the official record, and it will be physically located in the Court of Appeals file in the order in which it was received through the Michigan Courts eFiling System.

- 6. **Service of Filings.** The parties are responsible for accomplishing service of all filings as required by the applicable court rules. A proof of service must be included with each electronic filing, indicating how the filing was served on all parties to the case. As a courtesy, the parties may agree to provide documents to each other via electronic means, but service under the court rules must be accomplished by first class mail or hand delivery of a paper copy of each filing.
- 7. **Signature.** The Michigan Courts eFiling System has been designed to apply an electronic signature to the complete efiling envelope (cover sheet form and attachments) just before it is submitted. This "signature" will lock each file in the envelope and prevent modification by the filer or anyone else. The electronic signature applied by the Michigan Courts eFiling System to each efiling envelope will be the electronic signature of the filing attorney or party appearing *in propria persona*.

Parties who are capable of applying digital signatures to documents, with or without enabled security, must omit such process from electronic filings submitted through the Michigan Courts eFiling System. The System was not designed to accommodate such additional security and its application will cause a failure of the submission.

Individual documents that are submitted as attachments to the Court of Appeals electronic cover sheet (such as claims of appeal, briefs, or motions) may be "signed" by typing "/s/ Thomas J. Attorney" or "/s/ Peter J. Smith" (if a party is appearing in propria persona) on the signature line of the document, or by applying a graphic representation of the signature before the document is converted to PDF.

- 8. **PDF Files.** All filings that are attached to a Court of Appeals electronic filing cover sheet for delivery to the Court through the Michigan Courts eFiling System must be in PDF format. The Court encourages the conversion of word processed documents through a distiller to enhance the searchability of the document by judges and staff attorneys. Non-original documents may be scanned into PDF. As noted above, digital signatures, with or without enabled security, are not permitted as they will cause a failure of the submission.
- 9. **Hours of Access.** Although the system will be available for use around the clock (with the exception of periodic maintenance), filings must be received by 5:00 pm in order to be docketed for that business day. Filings received after 5:00 pm will be docketed for the following business day.

Sandra Schultz Mengel Chief Clerk

6/20/05